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# Plan of Service and Budget Request for FY 2010 July 2009 Through June 2010

## Federation:

Tamarack

## Participating Federation Libraries:

### Public

Bitterroot Public Library  
Darby Community Public Library  
Flathead County Library System  
Lincoln County Public Libraries  
Mineral County Public Library  
Missoula Public Library  
North Valley Public Library  
Plains Public Library District  
Polson City Library  
Preston Town County Library  
Ronan City Library  
St Ignatius School-Community Library  
Thompson Falls Public Library

### Branch

Frenchtown School & Community Library

### Special

Rocky Mountain Laboratories Library

### School

Missoula County Public Schools  
Polson Middle School  
Thompson Falls High School

## Long Range Goals:

### Goal # Description

- |          |  |
|----------|--|
| <b>1</b> | <p>To create a Plan of Service (POS) for allocating revenues for implementation of programs and for conducting the business of the federation.</p> <p>Meeting twice a year allows more membership participation for prioritizing federation-wide library service needs. The Federation Coordinator provides leadership for federation business and oversight of the POS. The presence of State Library staff is crucial for consulting, guidance and updates on state-wide activities.</p> |
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#### Associated MSL Goals:

- 3 - MSL provides consultation and leadership to enable its patrons and partners to reach their goals.
  - 4 - MSL promotes partnerships and encourages collaboration among its partners and patrons so that their information needs can be met.
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### Goal # Description

- |          |   |
|----------|---|
| <b>2</b> | <p>To provide training and professional development for member libraries' staff.</p> <p>All library staff need to be informed of and trained in new technologies and innovative library services.</p> |
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#### Associated MSL Goals:

- 3 - MSL provides consultation and leadership to enable its patrons and partners to reach their goals.
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### Goal # Description

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|----------|--|
| <b>3</b> | <p>To improve technology for improving access to library content and services.</p> <p>Libraries must provide convenient, high-quality and cost-effective access to collections and services.</p> |
|----------|--|

#### Associated MSL Goals:

- 2 - MSL provides libraries, agencies, and its partners and patrons with convenient, high quality, and cost-effective access to library content and services.
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**Goal # Description**

- |          |   |
|----------|---|
| <b>4</b> | <p>To assist libraries with expanding and sharing their collections.</p> <p>Creating special collections for sharing among libraries benefits all federation library users. Borrowing and loaning materials is important for providing resources for library users beyond the scope of the local library.</p> |
|----------|---|

## Associated MSL Goals:

- 2 - MSL provides libraries, agencies, and its partners and patrons with convenient, high quality, and cost-effective access to library content and services.
  - 4 - MSL promotes partnerships and encourages collaboration among its partners and patrons so that their information needs can be met.
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**Goal # Description**

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|----------|--|
| <b>5</b> | <p>To provide support for individual libraries to meet Federation goals by planning and analyzing space usage and technology support needs necessary to support resource sharing activities.</p> <p>To facilitate federation-wide resource sharing, libraries need to continually re-evaluate the use of current space and technology support functions required to implement activities such as floating collections and space allocation for additional Web-content servers.</p> |
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## Associated MSL Goals:

- 3 - MSL provides consultation and leadership to enable its patrons and partners to reach their goals.
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**Goal # Description**

**6**

To encourage and support multi-type library participation in the Federation.  
Today's technologies allow access to collections in all types of libraries. The opportunity to network with all librarians in the federation will foster cooperation in providing library services.

Associated MSL Goals:

- 4 - MSL promotes partnerships and encourages collaboration among its partners and patrons so that their information needs can be met.
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## Administrative Costs:

Several administrative functions are centralized at the State Library, but Federation members may want to authorize a stipend (of not more then \$1,000) to the federation coordinator or designated person who is willing to work with the State Library and Federation membership to plan meeting agendas, set up meetings, and do the appropriate plan of service and annual report preparation and filing.

### Revenue Summary:

	Allotted
CST Revenue	\$43,460.00
General Fund	<u>\$0.00</u>
Total:	\$43,460.00

### Expense Summary:

	Budgeted
Admin Costs	\$0.00
Stipend	\$0.00
Operating Costs	\$0.00
Supplies	\$0.00
Communications	\$0.00
Equipment	\$0.00
Mileage	\$0.00
Continuing Ed.	\$0.00
Program 1 - TWO MEMBERSHIP MEETINGS	\$4,650.00
Program 2 - TRAINING AND PROFESSIONAL DEVELOPMENT	\$12,261.34
Program 3 - TECHNOLOGY	\$14,341.72
Program 4 - EXPANDING AND SHARING COLLECTIONS	\$11,606.94
Program 5 - PLLANNING FOR BUILDING IMPROVEMENT	\$0.00
Program 6 - MULTI-TYPE LIBRARIES	<u>\$600.00</u>
Total:	\$43,460.00

## Program Summaries:

### **Program: 1**

**Description:** TWO MEMBERSHIP MEETINGS

### **Narrative:**

Two membership meetings will be held in FY 2010, one in the fall and one in the spring. All librarians and public library trustees within the Federation are encouraged to attend and participate. It is beneficial that the Montana State Library staff and State Commissioners participate in the meetings.

The coordinator will:

- Arrange meetings with the host libraries
- Create and distribute appropriate notices and documents for the meetings
- Attend at least 3 State Library Commissioners meetings

Public libraries will receive mileage money for both meetings as determined by approved travel zones.

- Libraries traveling less than 100 miles round trip will receive no reimbursement.
- Libraries traveling between 100-200 miles round trip will receive \$50
- Libraries traveling between 200-300 miles round trip will receive \$75
- Libraries traveling more than 300 miles round trip will receive \$100

These meetings will:

- Conduct the business of the federation, including election of officers, in accordance with its by-laws
- Create the POS for the following year in a timely manner with membership participation.
- Allow networking among colleagues by sharing "joys and concerns" of each library attending
- Provide an opportunity for continuing education

### **Evaluation:**

The POS will continue to be a creative and fiscally responsible tool for providing library services to all federation residents.

The membership will mentor new librarians and new trustees by sharing "Joys and Concerns". State Library staff and State Commissioners will learn of the needs and concerns of libraries which will aid them in making decisions on library issues and securing federation support.

Librarians will be informed of state and national library issues.

#### **Associated Tamarack Federation Goals:**

1 - To create a Plan of Service (POS) for allocating revenues for implementation of programs and for conducting the business of the federation. Meeting twice a year allows more membership participation for prioritizing federation-wide library service needs. The Federation Coordinator provides leadership for federation business and oversight of the POS. The presence of State Library staff is crucial for consulting, guidance and updates on state-wide activities.

**Program** \$4,650.00

#### **Budget:**

<b>Budget Library Detail:</b>	<b>Amount</b>
Bitterroot Public Library	\$175.00
Darby Community Public Library	\$175.00
Flathead County Library System	\$100.00
Lincoln County Public Libraries	\$175.00
Mineral County Public Library	\$75.00
Missoula Public Library	\$3,150.00
North Valley Public Library	\$150.00
Plains Public Library District	\$100.00
Polson City Library	\$125.00
Preston Town County Library	\$100.00
Ronan City Library	\$100.00
St Ignatius School-Community Library	\$100.00
Thompson Falls Public Library	<u>\$125.00</u>
Total expenses for Program 1:	\$4,650.00
Variance from Program 1 budget:	\$0.00

**Program: 2****Description:** TRAINING AND PROFESSIONAL DEVELOPMENT**Narrative:**

Library staff will attend training and/or professional opportunities at local, state and national levels. Includes but is not limited to workshops, on-line courses, conferences and academic classes. Registration, mileage, lodging, meals and materials may be included in the costs.

**Evaluation:**

Library staff will provide new and improved library services for their users.

**Associated Tamarack Federation Goals:**

2 - To provide training and professional development for member libraries' staff. All library staff need to be informed of and trained in new technologies and innovative library services.

**Program**     \$12,261.34**Budget:****Budget Library  
Detail:****Amount**

Bitterroot Public Library	\$1,469.61
Darby Community Public Library	\$2,939.23
Missoula Public Library	\$2,939.23
Polson City Library	\$939.23
Preston Town County Library	\$1,469.62
Ronan City Library	\$300.00
St Ignatius School-Community Library	\$734.81
Thompson Falls Public Library	<u>\$1,469.61</u>

Total expenses for Program 2: \$12,261.34

Variance from Program 2 budget:     \$0.00

**Program: 3****Description:** TECHNOLOGY**Narrative:**



Libraries need to meet the minimal technology requirements to be able to participate in a shared catalog, interlibrary loan, etc. Each library will determine how to best address their technology needs.

Purchases may include, but are not limited to:

- Computer hardware, software and upgrades, firewall security
- Printers, scanners
- Membership costs for OCLC, Montana Shared Catalog, Virtual Reference
- Database costs
- Outreach and public relations costs promoting access to collections and library services

(Example of costs outside the scope of this program include, but are not limited to: e-books, furniture, barcodes and other supplies)

#### **Evaluation:**

Libraries will meet or pass minimal requirements for joining the Montana Shared Catalog.

Library staff will be able to more efficiently access on-line products and programs for processing materials, training staff and providing information to library users. There will be additional public access computers or up-graded current ones to meet the needs of library users.

#### **Associated Tamarack Federation Goals:**

3 - To improve technology for improving access to library content and services. Libraries must provide convenient, high-quality and cost-effective access to collections and services.

**Program**     \$14,341.72

#### **Budget:**

<b>Budget Library Detail:</b>	<b>Amount</b>
Bitterroot Public Library	\$1,469.61
Mineral County Public Library	\$2,939.23
Plains Public Library District	\$2,939.23
Polson City Library	\$2,000.00

Ronan City Library	\$1,319.62
St Ignatius School- Community Library	\$2,204.42
Thompson Falls Public Library	<u>\$1,469.61</u>
Total expenses for Program 3:	\$14,341.72
Variance from Program 3 budget:	\$0.00

**Program: 4****Description:** EXPANDING AND SHARING COLLECTIONS**Narrative:**

Libraries may purchase and share collection materials in accordance with the Tamarack Federation Collection Policy, including creating Book Club kits. To encourage and assist in sharing collections, libraries may choose to apply funds to courier and /or postage costs.

**Evaluation:**

Library communities will benefit from a new service: the sharing of Book Club kits. Materials purchased in accordance with the Tamarack Federation Collection Policy will be available to all libraries. Libraries will receive support in funding the cost of sharing materials.

**Associated Tamarack Federation Goals:**

4 - To assist libraries with expanding and sharing their collections. Creating special collections for sharing among libraries benefits all federation library users. Borrowing and loaning materials is important for providing resources for library users beyond the scope of the local library.

**Program**      \$11,606.94**Budget:**

<b>Budget Library Detail:</b>	<b>Amount</b>
Flathead County Library System	\$2,939.23
Lincoln County Public Libraries	\$2,939.23
North Valley Public Library	\$2,939.23
Preston Town County	\$1,469.61

Library  
 Ronan City Library      \$1,319.64  
 Total expenses for Program 4: \$11,606.94  
 Variance from Program 4 budget:      \$0.00

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**Program: 5****Description:** PLLANNING FOR BUILDING IMPROVEMENT**Narrative:**

Libraries may use funds to support the costs of planning for the best use of space directly related to federation-wide activities. Costs may include, but are not limited to:

- Consultant fees and travel
- Design models
- Wireless feasibility studies
- Cost analysis reviews for adding a courier access area

**Evaluation:**

Libraries will have "outside" experts advise them on best use of space or the need for expansion to improve participation in federation-wide activities.

**Associated Tamarack Federation Goals:**

5 - To provide support for individual libraries to meet Federation goals by planning and analyzing space usage and technology support needs necessary to support resource sharing activities. To facilitate federation-wide resource sharing, libraries need to continually re-evaluate the use of current space and technology support functions required to implement activities such as floating collections and space allocation for additional Web-content servers.

**Program**      \$0.00**Budget:****Budget** This program has no budget**Detail:** detail.**Program: 6****Description:** MULTI-TYPE LIBRARIES**Narrative:**

Non-public libraries (special, academic, school) may receive mileage money to attend the federation membership meetings. These libraries must request the money through the Federation Coordinator. Money will be distributed on a first come first served basis with mileage determined according to approved travel zones.

#### **Evaluation:**

There will be an increase in attendance and participation by non-public libraries at federation meetings.

#### **Associated Tamarack Federation Goals:**

6 - To encourage and support multi-type library participation in the Federation. Today's technologies allow access to collections in all types of libraries. The opportunity to network with all librarians in the federation will foster cooperation in providing library services.

**Program**            \$600.00

#### **Budget:**

<b>Budget Detail: Library</b>	<b>Amount</b>
Missoula Public Library	<u>\$600.00</u>
Total expenses for Program 6:	\$600.00
Variance from Program 6 budget:	\$0.00

## Signatures/Approvals:

**Membership Approval Date:** \_\_\_\_\_

**Federation Coordinator:**

\_\_\_\_\_  
Honore Bray - Library Director

\_\_\_\_\_  
Date

**Federation Advisory Board Chairperson:**

\_\_\_\_\_  
Ada Almgren - Library Board Member

\_\_\_\_\_  
Date

**Chairperson, Board of Trustees, Federation Coordinator's Library:**

\_\_\_\_\_  
Neal Leathers - Library Board Chair

\_\_\_\_\_  
Date

## Check Summary/Totals:

<b>Library</b>	<b>Check Amount</b>
Bitterroot Public Library	\$3,114.22
Darby Community Public Library	\$3,114.23
Flathead County Library System	\$3,039.23
Lincoln County Public Libraries	\$3,114.23
Mineral County Public Library	\$3,014.23
Missoula Public Library	\$6,689.23
North Valley Public Library	\$3,089.23
Plains Public Library District	\$3,039.23
Polson City Library	\$3,064.23
Preston Town County Library	\$3,039.23
Ronan City Library	\$3,039.26
St Ignatius School-Community Library	\$3,039.23
Thompson Falls Public Library	<u>\$3,064.22</u>
Total Allocated:	\$43,460.00
Total Budgeted:	\$43,460.00
Discrepancy:	\$0.00